



BUILDING CAPACITY IN YOUR PLANNED GIVING PROGRAM

“No great thing is created suddenly, any more than a bunch of grapes or a fig. If you tell me that you desire a fig, I answer that there must be time. Let it first blossom, then bear fruit, then ripen.”

~ Epictetus



THE SKY IS THE LIMIT: GROWING YOUR PLANNED GIVING CAPACITY

WHO WE ARE



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THE SKY IS THE LIMIT: GROWING YOUR PLANNED GIVING CAPACITY

THE RUNDOWN

- 01** The basics of Planned Giving: What is Planned Giving capacity
- 02** Building a PG Program NOT operating tactics
- 03** Marketing Planned Giving: The long-term engagement of your prospects
- 04** Case Studies: Your plan for your organization
- 05** Questions

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THE BASICS OF PLANNED GIVING

- My short definition of a Planned Gift: “A gift arranged today for the future benefit of a charitable organization that has as part of its process tax wise estate planning and that includes some third party to conclude.”
- Internal audience versus external audience: Planned Giving for internal use... what ever works best for external positioning.
- People give in this way primarily because they believe in your mission in the world!

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THE BASICS OF PLANNED GIVING

ANNUAL FUND (CURRENT)

- Immediate one-time relief of organizational need or fulfillment of desire
- Personal and emotionally driven
- Entrance into the process at any stage of the donor cycle
- Although influence on disbursement of funds, these funds are designated for specific use

PLANNED GIFTS (LEGACY)

- Connecting with long term values of the organization and its stated destiny
- Requires thoughtful planning and involves a long-term process that reaches beyond the donor’s life
- Creation of a partnership between the donor and the organization forever
- The last gift the donor will ever provide the organization

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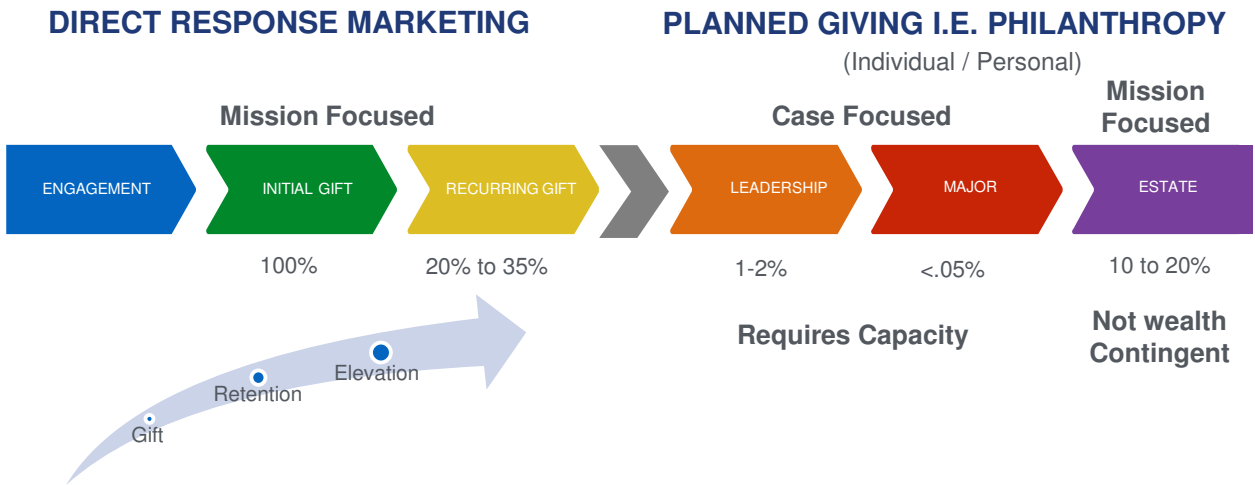
THE BASICS OF PLANNED GIVING

RICHARD RADCLIFFE (UK) RESEARCH

- This is a ‘middle class’ program – it is **NOT** a Major Gift Program
- Most donors (68%) prefer you raise the notion of a charitable bequests via direct mail.
- Everyone (100%) expect donor marketing to promote charitable bequests
- Donors may not want a personal visit on this topic (unless they are unusually wealthy)
- YOUR program must reflect YOUR community

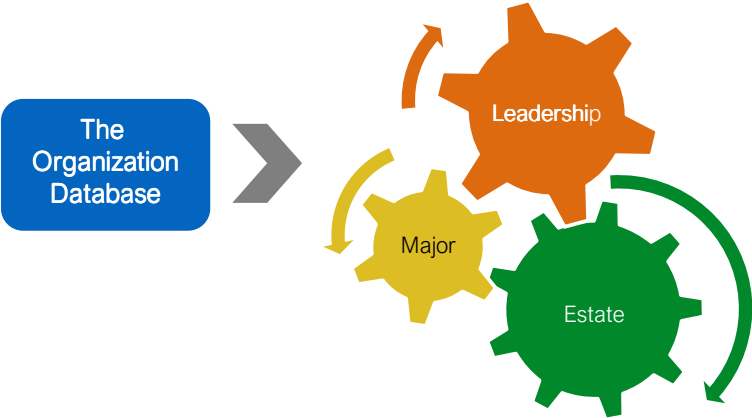
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THE BASICS OF PLANNED GIVING



THE BASICS OF PLANNED GIVING

PLANNED GIVING (ie. Philanthropy)



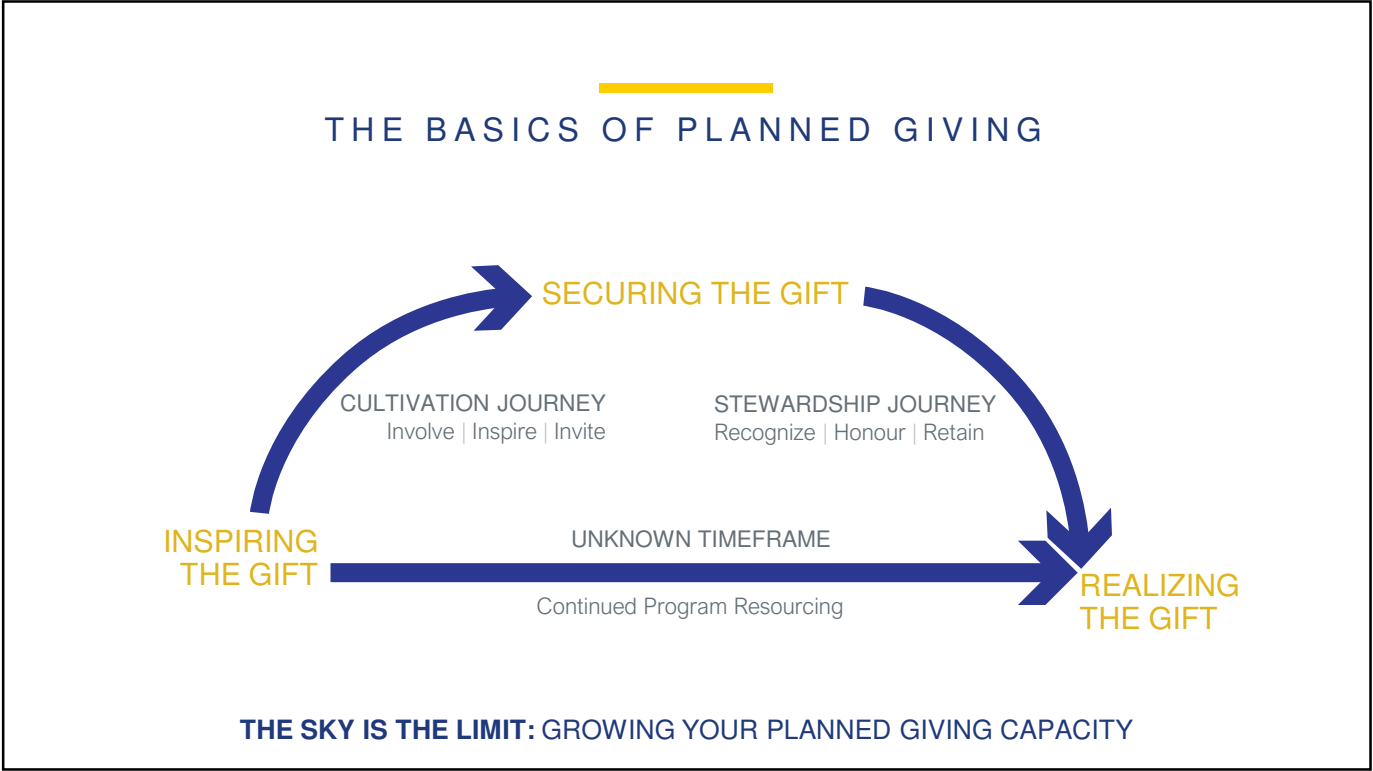
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THE BASICS OF PLANNED GIVING

Understanding ‘The Arc of the Gift’

- Reflects the philanthropic desires, financial circumstances and personal charitable giving objectives of the donor and family
- Is a long-term relationship building process with a charitable organization that allows the donor to understand the vision and needs of the charity
- Is made with the assistance of professional advisors after careful consideration through a financial or estate plan
- It connects in some way – with or without the organization’s assistance – with the values of the individual

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THE BASICS OF PLANNED GIVING

Planned Giving Facts:

- **Anyone can make a Planned Gift! Focus on engaging donors through showing examples of others like them**
- It is **easy to do** and does not cost the donor anything in life (ie. Loss of assets, fees, etc.)
- It has **tremendous future impact** on the mission of the organization
- **It does not effect what heirs and loved ones would have otherwise received**
- It provides **tremendous tax relief** to the donor’s estate **helping to minimize taxes.**

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THE BASICS OF PLANNED GIVING

Planned Giving Facts:

- The process of securing Planned Gifts is focused on the donor/organization relationship and satisfying the long term needs and desires of both – **donor centered**
- This relationship must be fostered as soon as possible with the organization and continue through the donor’s **‘life stages’ and stages of the donor pyramid**
- It must be **reinforced regularly and for the future**
- This will make the invitation to other giving levels seem a **natural progression** of that relationship
- **Remember, this is a dialogue or conversation**

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THE BASICS OF PLANNED GIVING



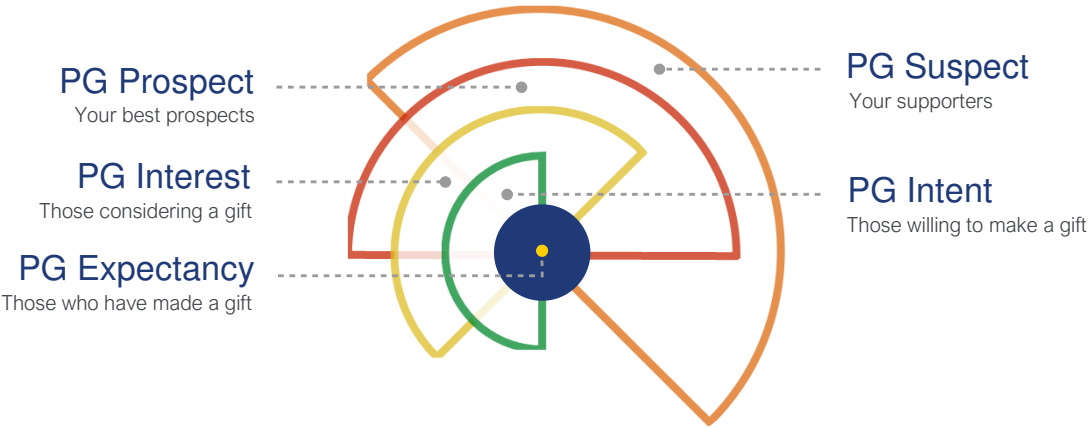
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PLANNED GIVING PROGRAM PLAN FLOW CHART



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MOVING DONORS THROUGH THE 'FLOW'



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LEVEL ONE – BROADCAST MARKETING

Identification of new prospects: engagement opportunities through internal networking, relationships external connections and peer screening

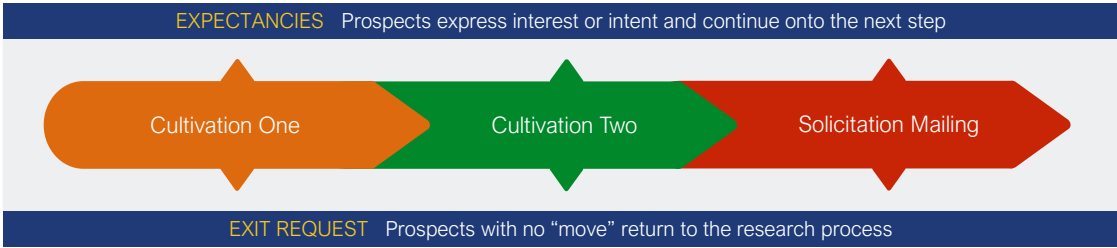


Prospect to move ratios 8+
Prospect portfolio 5,000+
Prospect contacts/week (projected) N/A
Average hours/week (projected) 2

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LEVEL 2 – MIDCAST MARKETING

Qualification and segmentation of donor base to create foundation of marketing efforts

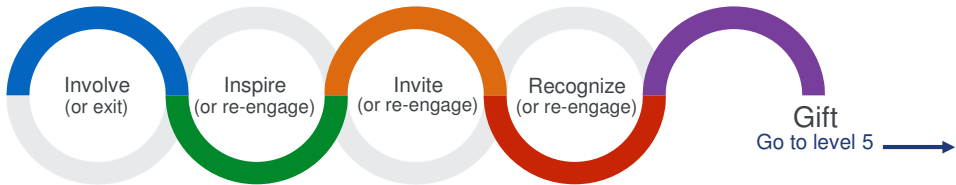


Prospect to move ratios 4
Prospect portfolio 1,500+
Prospect contacts/week (projected) 2
Average hours/week (projected) 2

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LEVELS 3&4 – NARROWCAST MARKETING

Ongoing relationship building and educating/updating the prospect. Match the prospect's interests with Planned Giving programs. Personal contacts are arranged to establish relationships.



Prospect to move ratios 1 to 2
Prospect portfolio 50-200
Prospect contacts/week (projected) 4
Average hours/week (projected) 4

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LEVEL 5 – RETENTION

Retention requires a constant dialogue that does the following



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PLANNED GIVING PROGRAM NOT TACTICS

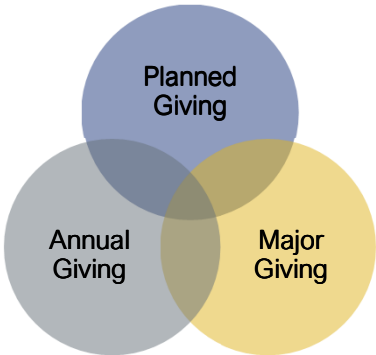
Who is our market directed towards?

- **Target by Donor Loyalty:** those who have given over many years and who have given recently
- **Targeting By Constituency:** donors, alumni/alumnae, parents, staff, client, 'users', etc.
- **Targeting By Demographics:** primarily age
- **Targeting by Values:** philanthropic intentions
- **Targeting By Life Stage:** single/youth stage, single advanced, two-person household (no children), households with children, 'empty nesters', retirement, widow/widower
 - Occurrences That Impact On Life Stages:
 - Birth of a Child, Promotion/Partnership, Death of Parent(s), Death of Spouse/Child/Loved, Receiving an Inheritance/Windfall, Divorce and/or Separation, Re-Marriage, Mortgage Paid, etc.

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PLANNED GIVING PROGRAM NOT TACTICS

PLANNED GIVING: INTEGRATED THINKING



All donors have a home somewhere – if not, bless and release them!

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PLANNED GIVING PROGRAM NOT TACTICS

What Major Gift Officers Think	What Personal Gift Officers Should Think (Ideally)	What Planned Gift Officers Think
Look for outright gifts	Look for outright and deferred gifts	Look for future gifts
Focus on gifts from income	Focus on gifts from income and assets	Focus on gifts from assets
Prospects have high net worth	All qualified prospects are cultivated	Prospects include those with modest or limited incomes
Longevity as a donor is not vitally important	Longevity of relationships is understood to be of interest to all concerned	Longevity as a donor is central to prospect segment
Planned gifts are confusing and technical	Understanding both current and deferred gift options is an asset	Love to talk about the technical aspects of gifts
Goal deadlines and urgency for gifts drive activity	A balanced approach to align recipient needs with donor interests/intentions	More focused on problem solving than closing gifts by a certain date
Spend most of their time with middle-age donors	Spend time with qualified prospects within appropriate age segments	Spend most of their time with older donors
Compensated for current year gift production	Compensated for both current year gift and expectancy production	Compensated for current year gift production

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MARKETING YOUR PLANNED GIVING PROGRAM

Broadcast marketing makes Planned Giving messaging distinct, but integral to your fundraising program.

- **The Planned Giving ‘Case for Support’**
 - Urgency doesn’t work! This isn’t a campaign case.
 - It is about **Purpose, Passion, Mission and Future Impact.**
 - Speak to Mission and Vision **and extend the achievement of that to the donor**
 - Adds long-range language to your donor engagement
 - Explain today’s need in the context of the next 20 years?
50 years? 100 years?
 - It is referenced in all communications related to Planned Giving
 - It becomes the ‘brand’ of your program
 - Your organization must commit to that ‘brand’

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MARKETING YOUR PLANNED GIVING PROGRAM

Broadcast marketing makes Planned Giving messaging distinct, but integral to your fundraising program.

- Add PG pages to your Website
- Add Buck-slips to Everything!
- Prepare for incoming Requests: information pieces, PG mailers, other low-cost collateral pieces
- Social Media
- General communications publications
- Annual Fund Direct Mail
- Legacy 'premiums'

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MARKETING YOUR PLANNED GIVING PROGRAM

Mid-Casting is the process of engaging your best prospects.

- Segment Database for specific mailing to your PG Prospects
- Specific PG mailings; cultivation and/or direct mail engagements
- Other donor engagement activities (survey your donors)
- Invitations to events with a purpose to engage the donor
- An engagement strategy (connection, cultivation, elevation)
- A solicitation strategy
- Stories about your donors and how they have made a difference
- Proactively engage Advisors (Allied Professionals)
- An engagement marketing strategy to engage planned giving segments of your donor base

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MARKETING YOUR PLANNED GIVING PROGRAM

Narrowcasting is when a Planned Giving Program becomes a Gift Planning Program.

- A direct engagement of a donor to create a dialogue and become a resource
- It requires the creation of a thoughtful and donor-centred 'micro-marketing' plan for each donor that is within this area of organizational activity
- Also known as the 'major gift' tactic and requires some of the skills and abilities of that type of donor engagement
- Specific materials are not necessary but can be helpful
- This is a 'proactive foreground' move and is part of a solicitation strategy to work with donors to help them create their gift of support

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MARKETING YOUR PLANNED GIVING PROGRAM

Stewardship is the process to ensure that gift intentions by donors are not changed.

- Stewardship program is the concept we regularly discuss and is the external messaging that we use
- Internal messaging should be 'pledge retention'
- This is an 'elevation' of donor contact by the organization
- Your current donors are your best potential new donors
- This requires the necessary understanding and investment by the organization

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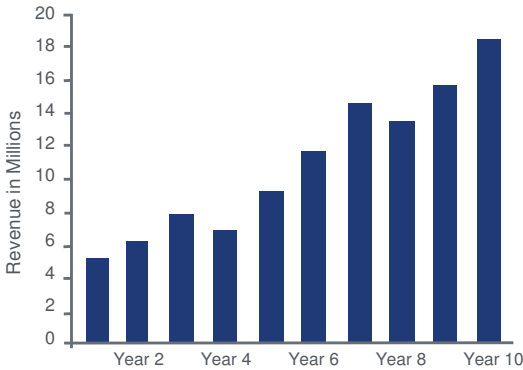


CASE STUDIES

A CANADIAN UNIVERSITY

What did they achieve and how?

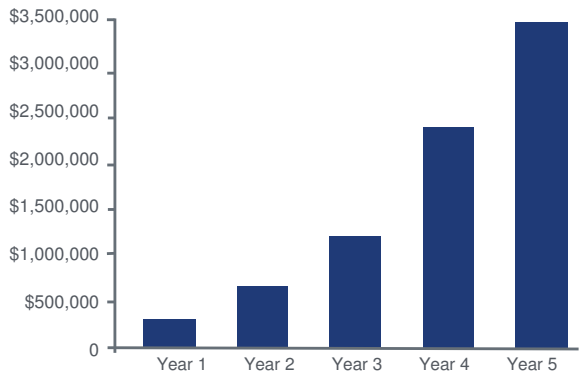
- Committed to the program, allocated resources
- Targeted segmentation of overall donor base
- Twice yearly newsletter as main marketing tool
- Twice yearly mail solicitations
- Meetings with donors when requested or an opportunity was presented
- Continual donor follow up
- Consistency of process and message



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CASE STUDIES

SOCIAL WELFARE ORGANIZATION



What did they achieve and how?

- Targeted segmentation of overall donor base
- Regular 'piggy-back' inserts
- Regular newsletter as main marketing tool
- Yearly direct mail solicitations
- Prospects focus groups, seminars and recognition
- Meetings with donors when requested or an opportunity was presented
- Continual donor follow up
- Consistency of process and message

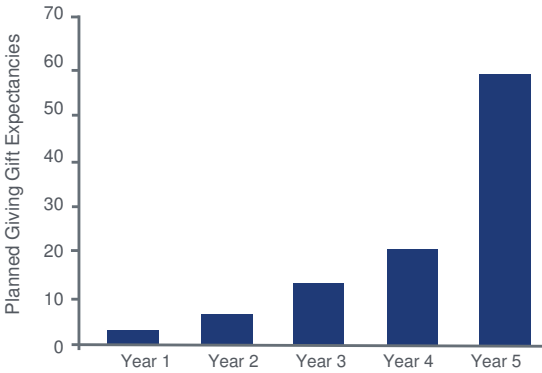
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CASE STUDIES

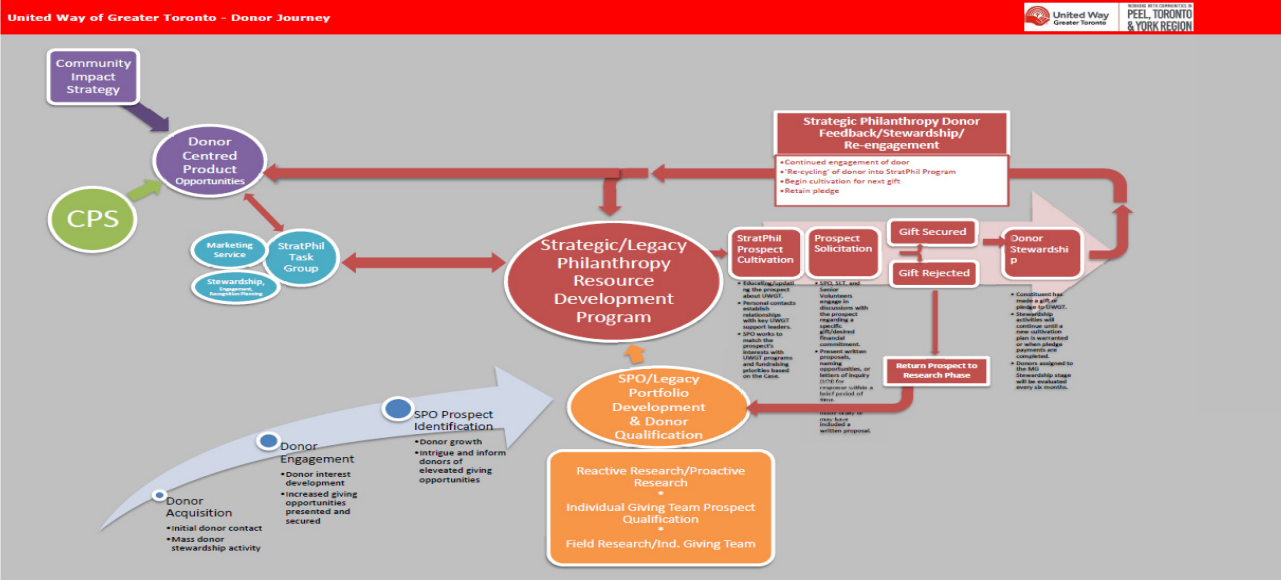
AN INDEPENDENT SCHOOL

What did they achieve and how?

- Targeted segmentation of overall donor base
- Established a planned giving identity
- Made a case for support for program
- Regular newsletter as main marketing tool
- Yearly direct mail solicitations
- Prospects focus groups, seminars and recognition
- Meetings with donors when requested
- Consistency of process and message



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PGgrowth 
Passionate about planned giving

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